A FREE FIELD GUIDE · NADIAHANSEN.COM

Set up your *AI coworker.*

The three layers that turn a chatbot into a coworker, with copy-and-paste prompts and a 90-minute weekend plan. No coding.

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100+ keynotes · 5,000+ professionals trained

START HERE

It's not a willpower problem. *It's a setup problem.*

Every January I watch the same thing happen. People make a list of AI tools they're finally going to learn. By February, they're back to copy-pasting into a chat window.

The people I see getting real leverage from AI didn't learn more prompts. They spent a few focused hours setting up an AI coworker **once**. Then it got more useful every week, without starting over.

A chatbot waits for you to explain everything, every time. A coworker already knows three things:

1

Context

Who you are, what you're working on, and how you like things done.

2

Skills

Saved recipes for the work you repeat every week.

3

Connectors

Access to where your work actually lives: email, calendar, files.

Miss one and you're back to babysitting. This guide walks you through all three.

What you'll need

- A paid plan for Claude, ChatGPT or Microsoft Copilot. Free plans work for Layer 1, but saved projects and connectors usually need a paid plan.
- About 90 minutes. One sitting is best.
- Your "Things I Hate to Do" list. If you don't have one, start it now: every task this week that felt repetitive, slow or draining.

> Menus and feature names change often. If a button isn't where I describe it, search your tool's help center for "projects," "custom instructions," "skills" or "connectors."

LAYER 1 · 30 MINUTES

Context. *Teach it who you are, once.*

Write a one-page working profile: your role, your clients, your priorities this quarter, how you like information delivered, and the phrases you'd never use. Save it where your AI reads it every time.

TOOL	WHERE YOUR PROFILE LIVES
Claude	A Project, with your profile in the project instructions or knowledge
ChatGPT	A Project, or Custom Instructions for every chat
Copilot	A Notebook or saved document you reference, or your organization's personalization settings

Don't write it from scratch. Let the AI interview you:

COPY THIS PROMPT

Interview me one question at a time to build a one-page working profile: my role, my priorities this quarter, the people I work with most, how I like information delivered, and phrases I'd never use. When we're done, write it as a document I can save and reuse.

> 🎙️ Do this one in voice mode. Typing makes you edit. Talking makes you honest.

What a good profile covers

- [ ] Role and business in two sentences
- [ ] Top three priorities for the next 90 days
- [ ] Your audience or clients, and what they care about
- [ ] Format preferences: bullets or prose, short or detailed
- [ ] Voice: three words that describe how you sound, and phrases you'd never say
- [ ] What it should always ask before doing

LAYER 2 · 30 MINUTES

Skills. *Turn repeat work into a recipe.*

Go back to your "Things I Hate to Do" list. Pick the task you do most often, not the most impressive one. **Frequency beats ambition.**

Walk the AI through how you do it, once, and save the result as a skill or saved instruction. This is how I got Claude writing my newsletters and LinkedIn posts in my voice. I taught it once. Now I reuse it every week.

COPY THIS PROMPT

I'm going to walk you through how I do [task]. Ask me questions until you could do it without me. Then write it up as step-by-step instructions you can follow next time, including what "done well" looks like.

Great first skills

IF YOU…	BUILD A SKILL FOR…
Run a small business	Replying to common customer emails in your voice
Consult or coach	Turning call notes into a recap and next steps
Lead a team	Your weekly update from bullet points
Create content	One idea into a LinkedIn post, an email and a caption
Sell	Researching a prospect before a first call

Your first skill

Task I'll hand off first:

How often I do it, and how long it takes:

What "done well" looks like:

LAYER 3 · 30 MINUTES

Connectors. *Hand over the keys.*

A brilliant model with no access to your inbox, calendar or files is an intern locked out of the building.

Connect **one** place where your work actually lives: email, calendar or drive. Then give it a real task.

TRY THESE FIRST

"What do I need to prep for this week? Check my calendar and flag anything I haven't prepared for."

"Find the emails from the last two weeks that are still waiting on a reply from me, most urgent first."

"Summarize the latest version of [document] in five bullets and list the open questions."

🔒 The guardrails I use

- [ ] Start with one folder, not your whole drive.
- [ ] Nothing gets sent without you reviewing it first. Have it write drafts, not send emails.
- [ ] Keep account numbers, passwords and anything confidential about your employer out of it.
- [ ] If you use AI for work, check your company's AI policy and use the tools it approves.
- [ ] Review what's connected once a month and disconnect what you don't use.

> The first win usually comes from the calendar. "Prep me for tomorrow" is the fastest way to feel the difference between a chatbot and a coworker.

THE 90-MINUTE WEEKEND VERSION

Do these three things *and you'll start the week with a coworker.*

0–30 min · Build your context file

- [ ] Open a new project in your AI tool
- [ ] Run the interview prompt in voice mode
- [ ] Save the profile into the project and test it: "Write a two-line intro of me for an event host."

30–60 min · Build one skill

- [ ] Pick your most frequent task
- [ ] Run the skill-building prompt and answer every question
- [ ] Save the instructions and test them on a real example from this week

60–90 min · Connect one tool

- [ ] Connect your calendar, email or one drive folder
- [ ] Ask: "What do I need to prep for this week?"
- [ ] Set your guardrails: drafts only, nothing sent without review

Then, every week

Add one new skill. Update your profile when your priorities change. In 30 days you'll have four skills and a coworker that knows your work better than most new hires.

WHEN IT DOESN'T WORK

Quick fixes

WHAT'S HAPPENING	TRY THIS
It sounds generic	Add three real examples of your writing to the project and say "match this voice."
It forgets what you told it	Put it in the project instructions or profile, not in a single chat.
It makes things up	Ask it to quote its source, and connect the file it should be working from.
The output is too long	Add a rule to your profile: "Default to five bullets or fewer."
You don't know what to hand off	Ask: "Based on my profile, what are five tasks you could take off my plate this week?"

WANT TO DO IT WITH ME?

Set it up live, *together.*

I run small, hands-on live sessions where we build your context file and skills around your real work, and connect your tools with safe guardrails. You leave with it working.

- **Live classes:** nadiahansen.com/classes
- **AI Adoption Lab:** my community for people putting AI to work every week. nadiahansen.com/#lab
- **For your team:** workshops and keynotes. nadiahansen.com/#book

Reply to any of my emails and tell me the first thing you handed to your AI coworker. I read every one.

Humanly yours, Nadia